

# Request for Rollover of Retirement Savings

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]

[Recipient's Name]

[Recipient's Title]

[Recipient's Company/Institution Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally request the rollover of my retirement savings account with [Current Institution/Company Name] to my new retirement account with [New Institution/Company Name]. My account number is [Account Number].

Due to [brief explanation of reason for rollover, e.g., changing jobs, better investment options], I believe this rollover is in my best interest to better manage my retirement savings.

Please initiate the rollover process at your earliest convenience. I have attached any required forms and documentation to expedite this request. If you require any further information, please feel free to contact me at [Your Phone Number] or [Your Email Address].

Thank you for your assistance.

Sincerely,

[Your Name]